



Private Sector Mobilization for Family Planning Project

Customer Service Plan

Submitted by:

Chemonics International Inc.

For:

USAID/Philippines

Contract No. 492-C-00-04-00036-00

A. INTRODUCTION

The Private Sector Mobilization for Family Planning (PRISM) Project Customer Service Plan (CSP) will be an opportunity for the project to obtain important feedback and information from the range of partners, beneficiaries, and clients served by the project. The customer service plan is meant to be management tool that will be periodically updated as new information comes into focus. The purpose of this document is to define project customers, outline the project methodology to include customer perspectives in project objectives, and provide the project with guidelines on how to assess customer input. The CSP will provide a framework for PRISM to understand the needs of primary stakeholders benefiting from PRISM assistance as well as ensuring that their perspectives are reflected in PRISM's overall performance.

B. PRISM'S CUSTOMERS

The PRISM project customers are defined as the people, organizations, institutions, and businesses benefit from the products and services provided by the project. The CSP segments the project customer base into four groups, listed below. Within these groups, PRISM will focus on obtaining input and receiving consistent feedback on project activities and interventions. The groups are defined as follows:

- *Client.* USAID/Philippines mission
- *Partners.* U.S. based subcontractors, local subcontractors, grantee recipients, and organizations with a PRISM memorandum of understanding
- *Intermediate Customers.* Midwives, physicians, pharmacists, and peer educators who interact with end users on family planning
- *Ultimate Customers/End-users.* Women of reproductive age in the Philippines – the ultimate recipient of PRISM products and services.

C. CSP METHODOLOGY

The PRISM CSP methodology mirrors USAID's criteria and tips for CSP design and implementation.¹ Our proposed PRISM CSP (Annex A) tracks involvement of customers in the main project elements following the key activities listed below:

Address project strategies and components. The PRISM CSP examines PRISM's relationship to the client under Strategic Objective (SO3), "*Desired family size and improved health sustainably achieved.*" The PRISM CSP will also track the range of customers served by following the strategies outlined in the annual workplans for the three project components and their objectives:

- *Component 1, Workplace Initiatives:* Increase formal employment sector support for family planning counseling, motivation, service delivery or referrals in the workplace

¹ http://www.usaid.gov/about/part_devel/docs/howknow.html

- *Component 2: Market Development:* Establish viable mass market brands of hormonal contraceptives in the commercial sector
- *Component 3, Private Provider Services Expansion:* Increase business value of family planning for private providers

Formulate Customer Targets. The PRISM CSP identifies customer targets as clients, partners, intermediate customers, or ultimate customers/end-users. (See Section B)

Establish and continually re-examine PRISM assumptions. To ensure the project assumptions are correct, PRISM CSP focuses on answering three questions:

- 1) *"How do we know we are doing the right thing?"* Under our strategic objective and components we consider the various assumptions and hypotheses embedded in our results framework. For each, we list the sources of knowledge and data that have been considered in developing our strategies. For PRISM, these sources are primarily the Philippine National Demographic and Health Survey, the National Family Planning Survey, IMS reports, pharmaceutical industry related reports, USAID reports, past project evaluations, USAID advice and guidance, other donor reports, and conclusions from annual PRISM strategic work planning workshops.
- 2) *"How do we know that implementation is working?"* This second question is asked once PRISM has completed initial phases of activity implementation and requires the project to re-examine annual assumptions and identify other sources of knowledge that will provide formal project feedback including:
 - Contractor and grantee reports,
 - Media and other independent reports
 - Programs and policies implemented
 - Staff observations in the field
- 3) *"What must we do to verify our feedback?"* This question is asked so PRISM can identify tools/methods to verify original assumptions. It focuses on the quality of feedback PRISM will receive from its customers and their final end users. The PRISM CSP identifies tools and mechanisms to collect information to verify original assumptions and reveal unexpected opportunities and constraints. Mechanisms that will assist PRISM in gathering this information will include:
 - Key Informant Interviews
 - Mystery Client Surveys
 - Focus Groups
 - Group Discussions
 - Exit Interviews

Assign personnel responsible, frequency of data collection, and resources needed. The PRISM CSP focuses on creating realistic timelines and schedules of when PRISM will execute the customer feedback mechanisms/activities. While general responsibility

will fall to the specific PRISM component directors, all project members will be accountable to give input to the CSP on an ongoing basis, allowing for a full CSP update to occur on an annual basis. This update will also include re-examining responsible personnel and estimates for resources needed to implement customer feedback activities.

D. STEPS IN CONDUCTING ANNUAL CUSTOMER SERVICE ASSESSMENTS FOR THE CSP

Customer service assessments will be conducted on an annual basis beginning the second year of the project as the first year of the project has just begun to ramp up activities with all major PRISM customer groups. The process will follow the steps below to ensure quality customer feedback. For the timing of each step refer to Figure 1 at the end of Section D.

Step 1. Decide when the annual assessment should be done. Beginning year one, PRISM component areas under direction of the component directors and M&E Specialist will be compiling customer information for management purposes as well as working with our client, partners, and intermediate customers to identify timing and schedules of future customer assessments. All customer service assessments will be conducted one quarter prior to submission of the annual strategic workplan to USAID.

Step 2. Designing the assessments.

Preliminary assessment design will take place during annual strategic work planning. By the second quarter of each workplan year (January to March), the PRISM M&E Specialist will develop a scope of work for each customer service assessment to be conducted. At a minimum, planning the assessment will 1) identify the purpose and intended uses of the information, 2) clarify the program products and services being assessed, 3) identify the customer groups involved, and 4) define the issues the study will address. Moreover, the scope of work will discuss data collection methods, analysis techniques, reporting and dissemination plans, and a budget and time schedule. The designed scope of work will be incorporated into subcontracts and/or grants with PRISM partners to conduct the customer service assessments or will be part of a separate customer service assessment with an independent subcontractor (see Attachment A for specific cases)

Box 1: Illustrative "Best Practice" Criteria For Assessing Service Delivery

Convenience. Ease of working with the PRISM, simple processes, easy access to contacts.

Responsiveness. Follow up promptly, meet changing needs, solve problems, answer questions, return calls/emails.

Reliability. On-time delivery that is thorough, accurate, complete.

Quality of products and services. Perform as intended; flexible in meeting local needs; professionally qualified personnel.

Breadth of choice. Sufficient choices to meet customer needs and preferences

Contact personnel. Professional, knowledgeable, understand local culture, language skills.

Specific issues to be assessed will vary with the strategic objective and component activities. However, PRISM customer service assessments will aim at understanding:

- *Customer Views*, regarding the importance of various PRISM provided services (e.g. training, information, grants, and technical assistance) to their own needs and priorities.
- *Customer Judgments*, based on measurable service standards on how well PRISM is performing service delivery.

Step 3. Conduct the assessment. PRISM will use a range of in-house resources and external independent subcontracts to conduct the customer service assessments to maintain open and transparent relations with customers. PRISM will rely on current and future subcontracts and grantees to report on project related customer feedback especially in the cases where they are conducting surveys and trainings.

Beginning by the third quarter of the second year (April to June 2006), PRISM will conduct formal customer assessments utilizing an independent subcontractor. The chosen subcontractor will select from a broad range of methods, as directed in the RFP used to select the subcontractor. The PRISM M&E Specialist will identify inquiry tools designed to elicit information about the needs, preferences, or reactions of customers regarding its activities including but not limited to the use of:

- Formal customer surveys
- Rapid appraisal methods (e.g., focus groups, interviews with key informants)
- Participatory appraisal techniques in which customers plan, analyze, self-monitor, evaluate or set priorities for activities
- Document reviews, including systematic use of social science research conducted by others

Step 5. Conduct Customer Service Analysis. In most cases, it is expected that data analysis will be completed one month after data collection with a final report submitted to PRISM for review. The subcontractor will be expected to carry out assessments using systematic research methods. The subcontractor under supervision of PRISM M&E Specialist, will gather information from several sources and methods, rather than relying on just one. Such information triangulation will build confidence in findings and provide adequate depth of information for good decision-making and program management and evaluation.

Step 4. Broadly disseminate and use assessment findings to improve performance. It is expected that these PRISM customer service assessments will be designed to be consciously iterative and undertaken on an annual basis to enable the operating unit to build a foundation of findings over time to inform management of changing customer needs and perceptions. PRISM will share the customer service assessments with USAID beginning in year two and broadly disseminate general findings among its constituents and others as appropriate.

Figure 1: Illustrative Schedule of CSP Implementation

CSP Implementation	Year 1	Year 2			
	Quarter 4	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Annual Work Planning	X				X
Submission of the Work Plan to USAID	X				X
Decide timing of the annual assessments	X				
Design assessments	X	X	X		
Conduct assessments		X	X		
Conduct Customer Service Analysis			X	X	
Broadly disseminate and use assessment findings to improve performance					X

ATTACHMENT 1: PRISM PROJECT CUSTOMER SERVICE PLAN (CSP)

Customer Level	Customer Target	Sources of current PRISM Knowledge (information that led the project to it's current thinking)	What must PRISM do to verify information, feedback, and assumptions?	Frequency of reporting	Persons Responsible for data collection and reporting	Resources (personnel, institutional support, equipment)
Strategy: SO3: Desired family size and improved health sustainably achieved						
Client	USAID	DHS, FPS, USAID policy and experience, past projects	Our client USAID exercises regular and close oversight over the PRISM project, including approval of the annual workplans, short-term assignments, and acceptance of deliverables. USAID's regular interaction with the chief of party and periodic interaction with the home office project director and senior manager will provide ample opportunity for USAID to express concerns, suggest new activities or approaches, etc	Quarterly reports, Annual workplans, regular interaction with COP, monthly senior staff meetings with USAID and directors, project staff, and Home Office staff	COP and project director, PRISM staff as appropriate	Part of ongoing regular project M&E and management.
U.S. Based Partners	1. Subcontractors	Quarterly reports, deliverables by long- and short-term staff, consultant reports, invoices	PRISM will engage in regular meetings and consultations with all three U.S. based subcontractors through the chief of party and project director. All subcontractors will be invited to attend annual planning events and make quarterly and annual contributions to project reports.	Quarterly reports, Annual workplans, regular interaction with COP, project staff, and home office staff	COP, and Project Director	Part of ongoing regular project M&E and management.

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Strategy: Component 1: Increase Formal Employment Sector Support for Family Planning Counseling, Motivation and Service Delivery/Referrals in the Workplace						
Partners	Business association officials	Project PMP baseline information from survey of 2500 companies	<ol style="list-style-type: none"> 1. Key informant interviews with business association officials 2. Training evaluations 	<p>Annually</p> <p>End of each training event</p>	Component 1 director	<p>Internal PRISM M&E resources to collect and tabulate training evaluations</p> <p>Subcontractor to develop interview and conduct qualitative research.</p> <p>\$55,000 - Part of ongoing regular project M&E and management and part of existing subcontract</p>
Intermediate Customers	Company officials including senior management, labor union officials	Association reports, public statements on FP, current CBAs with FP incorporated, grievance committee reports	<ol style="list-style-type: none"> 1. Training evaluations 2. Key informant interviews 	<p>End of each training event</p> <p>Annually</p>	Component 1 director	<p>Internal PRISM M&E resources to collect and tabulate training evaluations</p> <p>Subcontractor to develop interview and conduct qualitative research.</p> <p>Estimated Cost: \$5,000</p>
End Users/Ultimate Customers	Gainfully employed WRA, labor union WRA members	FP service provision records	<ol style="list-style-type: none"> 1. Company employee opinion surveys 	2006, 2009	Component 1 director	<p>Internal PRISM M&E resources to collect and tabulate training evaluations</p> <p>Subcontractor to develop survey and collect data.</p> <p>Estimated Cost: \$25,000</p>

Customer Level	Customer Target	Sources of current PRISM Knowledge (information that led the project to it's current thinking)	What must PRISM do to verify information, feedback, and assumptions?	Frequency of reporting	Persons Responsible for data collection and reporting	Resources (personnel, institutional support, equipment)
Strategy: Component 2: Establish Viable Mass Market Brands of Oral and Injectable Contraceptives in the Commercial Sector						
Partners	Distributor, Pharmaceutical companies	IMS survey, Pharmaceutical Company newsletters and press releases, BFAD reports, PNDF(National Formulary)	1. Key Informant Interviews	Annually	Component 2 Director	Subcontractor to develop interview and conduct qualitative research. Estimated Cost: \$10,000
Ultimate Customer	WRA using modern FP methods	DHS and NFP surveys	1. Exit interview survey	Annually	Component 2 Director	Subcontractor to develop exit interview survey and collect data. Estimated Cost: \$10,000
Strategy: Component 3: Increase business value of family planning in private provider's practice						
Partners	Midwife Associations, Pharmacist, Drugstore and Physician Associations	National and Regional Conference reports	1. Training evaluations 2. Key Informant interviews	Annually	Component 3 Director	Internal PRISM M&E resources to collect and tabulate training evaluations Subcontractor to develop interview and conduct qualitative research. Estimated Cost: \$10,000
Intermediate Customers	Midwives in private practice Drugstore Owners and staff	DHS and NFP surveys, Association midwifery logs and conference attendance logs	1. Focus groups with DSAP 2. Mystery Client for drugstore owners and midwives	Annually	Component 3 Director	Subcontractor to develop focus group discussions, mystery client design and collect data for each Estimated Cost: \$5,000-\$15,000

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End Users/Ultimate Customers	WRA who report obtaining their method from a private midwife	DHS and NFP surveys	1. Interview survey comparing satisfaction among WRA utilizing private midwives who have/have not received MEP training.	2006, 2009	Component 3 Director	Subcontractor to develop exit interview survey and collect data. Estimated Cost: \$5,000-\$15,000

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